

# The nature and practice of strategic planning in Egypt

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- *This paper aims to fill a gap in the literature of strategic management by providing a profile of organizations working in Egypt regarding their practice of strategic planning. Based upon responses from 120 organizations, the respondents have a positive attitude towards strategic planning.*
- *There are relatively few significant differences in the findings between manufacturing and service organizations compared with the differences between local and foreign organizations and also between small and large organizations. Unexpectedly, a high percentage of the respondents are not familiar with some of what are seen as the traditional tools of strategic management.*

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## Introduction

Since the early 1980s, systematic and formalized approaches to strategy formulation have come under heavy attack from scholars (Grant, 2003) and strategic planning has suffered a downturn in popularity and influence. In large part this was due to the inability of strategic planning tools to deliver what was expected of them. In recent years, much scholarly attention has been devoted to the application of theory and research from the field of behavioural decision-making, such as heuristic modes of thinking and reasoning, to the analysis of strategies (Hodgkinson *et al.*, 2002). As March (1999) stresses, the trend is increasingly to challenge the overly rational perspective of the strategy-making process and to see the process more as a matter of

making sense of situations. Confidence in the value of strategic planning was thus eroded, leading many organizations to dispense with their 'armies of planners' (Collis and Montgomery, 1995). Moreover, the relationship between strategic planning and organizational outcomes seems to be problematic. It has been a subject of continuing controversy among researchers (Andersen, 2000; Elbanna, 2006; Greenley, 1994).

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However, during the 1990s, strategic planning restored some of the reputation that it had previously lost (Glaister and Falshaw, 1999); and meta-analyses show that, in studies

of the period, the overall relationship between formal planning and performance is significantly positive (Miller and Cardinal, 1994; Schwenk and Shrader, 1993). In addition to financial consequences, strategic planning may also lead to non-financial consequences which could provide benefits to the organization (Greenley, 1986). For example, Grant (2003) points out that strategic planning systems create contexts which influence the content and quality of strategies. In conclusion, the preponderance of the results of previous research supports a positive relationship between strategic planning and performance.

Given that the maturity of an academic discipline is often judged by the extent to which its theories and principles are employed in daily practice in ways which help practitioners to identify and explain phenomena which are not obvious to them, the field of strategic management is still in the early stages of its development compared with other disciplines such as engineering and medicine. Moreover, the relative immaturity of strategic management, compared with other established areas of business and management theory, is evidenced by inconsistent and conflicting views. It is possible to benchmark the maturity of strategic management taking the criterion of the extent to which its theories and tools are employed by managers in their strategic planning activities (Stonehouse and Pemberton, 2002). Practical research in this area is fairly scarce, with most of it coming from the developed countries, especially the UK and the USA. Indeed, there has been general agreement between scholars that a major weakness of many studies is that they treat all organizations alike, despite the presence of meaningful differences among them based on setting.

To date, there has been relatively limited research on the use of strategic planning tools. Most of the empirical research reporting tool usage has included one or two questions on tools as part of a major study of strategic planning processes (Hussey, 1997). Despite the recent research efforts on the practice of strategic planning (e.g., Frost, 2003; Greenley *et al.*, 2004; Liedtka, 2000; Schaffer and

Willauer, 2003), no empirical work has examined the practice of strategic planning in the Middle East region. This study is designed to fill this gap in the literature by reporting the results of a survey on the use of strategic planning tools by organizations working in Egypt. Egypt's position in the Middle East makes the country a good candidate for the purposes of this research. It used to be characterized by a non-competitive and highly centralized public sector which dominates its economy, but this situation has changed considerably as a result of the privatization policy over the last 15 years.

Due to the exploratory nature of this work, the key concepts considered are generally of the broader kind. Drawing upon the general literature of strategic management, the focus of the paper is thus:

- To explore views and attitudes on the importance of strategic planning, its obstacles, processes and outcomes.
- To assess the extent to which the tools of strategic planning are employed in the sampled organizations.
- To reveal the level of involvement by the organizational hierarchy in the strategic planning process and the role of outsiders in this process.

The intent is to develop a profile of organizations working in Egypt with respect to their practice of strategic planning. Strategic planning in this study is defined as the development of a long-range written plan which covers more than 1 year for the effective management of environmental opportunities and threats, in the light of organizational strengths and weaknesses. Strategic planning should include formulating an organization's mission and/or vision, specifying long-term objectives and developing strategies which the organization plans to use to achieve these objectives.

### **Methodology**

Because of the difficulties facing researchers in collecting data in Egypt (Al-khatib *et al.*,

1997; Elbanna and Child, 2007a), a personal delivery and pick-up system seemed to be the most appropriate method of collecting the questionnaire. Questionnaires were collected from MBA students in the Graduate School of Business of the Arab Academy for Science and Technology in Cairo. When distributing questionnaires, the researcher gave students some guidelines on how to complete them, stressing the importance of their cooperation and the benefits they could get by participating in the study. The covering letter of the questionnaire included a written definition of strategic planning, in order to unify the way in which respondents would understand this concept. As suggested by Bagozzi (1994), three steps in the critical review process of the questionnaire were taken. The researcher made the first critical review. Five academics from the UAE University made the second one. The third one was a pilot test of the questionnaire on 18 MBA students in the Arab Academy for Science and Technology who had had experience as executives. Some of the items in the questionnaire were reversed to reduce response bias.

Some 350 questionnaires were dispensed from October 2005 to January 2006 and 120 usable questionnaires were collected, representing a 34% response rate. Respondents were department or section heads (39%), professionals (28%), product, project or district managers (14%), assistant managers (7%), general managers or managing directors (4%) and other executives (8%). It is worth noting that 32% of respondents were female, which may be considered a distinctive feature of this study compared with related research conducted in the same context. For example, Elbanna and Child's (2007b) study on Egyptian private manufacturing companies reports that all the respondents were male. This may be due to the type of respondents in each study — MBA students in the present study as opposed to senior managers in Elbanna and Child's study. However, the results of this study could be an indicator of the increasing importance of female managers in Egypt in the future.

## Results

### Descriptive analysis of the sample

The organizations in the sample represent a variety of industries: communication and IT (27%), pharmaceutical (20%), industrial manufacturing (18%), financial services (12%), education (6%), trading (5%), other service industries (3%) and unspecified (9%). These percentages indicate that the first three industry sectors are the most representative in the sample, accounting for 65% of the whole. It is worth noting that more than a quarter of the sample is working in the communication and IT industry. This indicates the growing significance of this industry, which is nowadays considered one of the leading sectors of the Egyptian economy. The current Prime Minister of Egypt belongs to this sector. Though it would have been useful to compare the percentages of the numbers of organizations working in these sectors in the sample with the whole population, the unavailability of published data on the whole population prevented our doing so.

Some 38% of the sampled organizations were classified as operating in the manufacturing sector (pharmaceutical and industrial), while 53% were in the service sector (communication and IT, financial services, education, trading and other service industries). Organizations were divided into 39% from the foreign private sector, 35% from the local private sector, 14% from the public sector, 9% representing joint ventures and 3% unspecified. In total, 83% of the sampled organizations were classified as operating in the private sector and 14% as operating in the public sector; this indicates the growing importance of privately owned firms in the Egyptian economy.

The sample has a mean number of employees of 1489. The numbers of employees in 58% of the organizations range from 7 to 1000 employees, while approximately 31% of the organizations have a work-force ranging between 1001 and 16000. This data suggests that the sample seems to be biased towards small and medium-size organizations. This may

**Table 1.** Time taken for preparing strategic plans

	All organizations		Ownership				Type of activity				Number of employees			
			Local private		Foreign private		Manufacturing		Services		Small		Large	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Under 1 month	12	12.2	5	13.5	3	7.7	9	22.5	2	3.8	8	16.7	3	7.3
1–4 months	36	36.7	10	27.0	17	43.6	14	35.0	22	42.3	21	43.8	14	34.1
5–8 months	18	18.4	11	29.7	5	12.8	7	17.5	9	17.3	8	16.7	6	14.6
9–12 months	13	13.3	5	13.5	6	15.4	3	7.5	10	19.2	4	8.3	8	19.5
Over 1 year	19	19.4	6	16.2	8	20.5	7	17.5	9	17.3	7	14.6	10	24
Total <sup>1</sup>	98	100	37	100	39	100	40	100	52	100	48	100	41	100

<sup>1</sup> Totals are less than 120 because of missing values.

be due to the effect of the setting; the Egyptian economy can at best be classified as one of the emerging economies. In addition, the nature of the sample has meant that 83% of the sampled organizations belong to the private sector. It is worth noting that the part played by privately owned firms in the Egyptian economy started to increase only after the economic reform programme was launched in the 1990s. Therefore, privately owned firms working in Egypt are expected to be smaller than those included in similar studies conducted in developed countries. Finally, 95 respondents (79%) requested a summary report on the final results of this study; reflecting their interest in its topic, and may have affected the seriousness of their responses (Finkelstein, 1992).

### Time taken for preparing strategic plans

As shown in **Table 1**, more than a quarter of organizations in all sectors (27%–43.8%) take 1–4 months to prepare their strategic plans. There is little difference between local and foreign private organizations with regard to the length of preparation for strategic plans. Regarding the type of activity, the percentage of manufacturing organizations which takes

less than 1 month to prepare a strategic plan is about six times the percentage among service organizations. This could be due to the fact that manufacturing organizations might have more experience than service ones in preparing strategic plans. As expected, the percentage of large organizations which spend 9 months or more on preparing their strategic plans (43.5%) is almost double the percentage of small organizations which do so (22.9%), while the percentage of large organizations which spend 4 months or less on preparing their strategic plans (41.4%) is almost two-thirds that of the small organizations which do so (60.5%).

### Written plans

**Table 2** shows that 35.8% of organizations in the sample do not have written strategic plans. This is in disagreement with the findings of Glaister and Falshaw (1999) and Ibrahim *et al.* (2004), who reported that only 2.7% and 19.5%, respectively of organizations do not have written strategic plans. This may be due to the different settings of the studies, the UK and the USA, respectively in the former two studies and Egypt in this study. These findings indicate that organizations working in Egypt

**Table 2.** Length of strategic plans

	All organizations		Ownership				Type of activity				Number of employees			
			Local private		Foreign private		Manufacturing		Services		Small		Large	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Not written	34	35.8	17	47.2	10	25.6	15	36.6	17	34.0	14	30.4	16	38.1
1–20 pages	29	30.5	11	30.5	11	28.2	13	31.7	16	32.0	20	43.5	8	19.0
21–40 pages	18	19.0	5	13.9	10	25.6	8	19.5	10	20.0	9	19.6	9	21.4
Over 40 pages	14	14.7	3	8.3	8	20.5	5	12.2	7	14.0	3	6.5	9	21.4
Total <sup>2</sup>	95	100	36	100	39	100	41	100	50	100	46	100	42	100

<sup>2</sup>Totals are less than 120 because of missing values.

may practice strategic planning less than their counterparts in developed countries. It is worth noting that the relatively high percentage in Ibrahim *et al.*'s study (19.5%), compared with the low percentage in Glaister and Falshaw's study (2.7%), may be due to company size, since the former studied small firms and the latter studied large businesses.

As Table 2 shows, more than a quarter of organizations in all sectors (25.6%–47.2%) do not have written strategic plans. It is not surprising that the percentage of foreign private organizations which have no written strategic plans (25.6%) is almost half that of local private organizations (47.2%). Moreover, strategic plans in the local private sector seem shorter than those in the foreign private sector, with 25.6% and 20.5% of foreign private organizations having written strategic plans from 1–20 pages and 21–40 pages in length, respectively, while these percentages in local private organizations are 13.9% and 8.3% correspondingly. This may be due to the extensive experience of foreign private organizations in preparing strategic plans. The findings also indicate that there are no significant differences between manufacturing and service organizations. Predictably, the percentage of small organizations which have written strategic plans between 1–20 pages (43.5%) is bigger than that of large ones

(19.0%), while the percentage of small organizations which have written strategic plans over 40 pages long (6.5%) is smaller than that of large ones (21.4%).

### Views on the importance of strategic planning, its obstacles and processes

Table 3 shows respondents' views on a number of statements concerning the importance of strategic planning, its obstacles and processes. Moreover, this table gives a breakdown by sectors of the various issues addressed in the table. The first ranked statement in all sectors is 'strategic planning is seen as important' (means range from 4.22 to 4.61) with 91% of respondents agreed or strongly agreed that strategic planning is seen as important, a majority being in the latter category (51%). These results show very positive attitudes towards the importance of strategic planning in all sectors. Although both local organizations and foreign organizations show very positive attitudes towards the importance of strategic planning, a test of difference in means shows that there is a significant difference between the two groups of organizations. This has a significantly higher importance in foreign organizations than in local organizations.



**Table 3.** Views on the importance of strategic planning, its obstacles and processes

	All organizations <sup>3</sup> (N = 120)	Ownership		Type of activity		Number of employees	
		Local private (N = 41)	Foreign private (N = 46)	Manufacturing (N = 45)	Services (N = 64)	Small (N = 55)	Large (N = 51)
Strategic planning is seen as important	4.44	4.22	4.61	4.53	4.33	4.47	4.37
Nowadays, the environmental conditions change so fast that engaging in strategic planning has become very difficult	3.54	3.71	3.39	3.53	3.50	3.44	3.51
The correct strategic planning requires people and money that are unaffordable	2.62	2.78	2.35	2.51	2.66	2.73	2.39
A senior figure's mission/vision is our strategy	3.15	3.22	3.13	3.02	3.22	3.16	3.10
Our strategic planning procedures can be described as largely unstructured with no planning manual and few forms	2.78	3.17	2.39	2.73	2.81	2.85	2.75
Our strategy is a compromise which accommodates the conflicting interests of powerful groups and individuals	3.23	3.07	3.17	2.98	3.34	3.25	3.10
Our strategy is personal goals-oriented	2.42	2.51	2.13	2.49	2.36	2.44	2.31

<sup>3</sup>The mean is an average on a scale of 1 = strongly disagree to 5 = strongly agree.

Respondents were asked about two obstacles to strategic planning, namely environmental changes and the resources available for strategic planning. It is notable that the statement 'environmental conditions change so fast that engaging in strategic planning has become very difficult' has a greater mean than the mean for the statement that 'correct strategic planning requires people and money that are unaffordable'. Moreover, the mean scores for changes in environmental conditions were above the mid-points of their scales (means range from 3.39 to 3.71), while the mean scores for the availability of people and money were below the mid-points of their scales

(means range from 2.35 to 2.78). This indicates that the resources required for adopting a strategic planning approach may not be a significant obstacle in the Egyptian setting, but the environmental uncertainty may be significant. However, a test of difference in means between the two groups of organizations in the three sectors indicates that there is no significant difference.

The last four statements in Table 3 address strategic planning processes. When examining these, some interesting findings arise. For example, 44% of respondents agree or strongly agree that 'a senior figure's mission/vision is our strategy'. There is little difference between

sectors; the mean scores for all are slightly above the mid-point. A test of difference in means confirms this finding and shows no significant difference. However, it is surprising that there is no significant difference between the local private sector and the foreign private sector. This may be because leaders of foreign private organizations working in Egypt are Egyptian, or because they may be following the mission/vision of their headquarters.

The positive response to the statement 'our strategic planning procedures can be described as largely unstructured with no planning manual and few forms' is slightly lower than the median measure of 3 for the whole sample and sub-samples of organizations located in all sectors except the local private sector. This indicates that the majority of organizations in the sample adopt a medium-structured and formal approach to planning. This is not altogether in accord with Stonehouse and Pemberton (2002), who report that the majority of organizations adopt a highly structured approach to strategic planning.

It is not surprising that the degree of formality is higher in Stonehouse and Pemberton's study than in the research presented here. This may be due to the settings of the studies, (the UK in the former study and Egypt in this one). The mean for the local private sector is higher than the mean for the foreign private sector, indicating that organizations in the foreign private sector tend to be more structured and formal than organizations in the local private sector, where the planning procedures are typically rather unstructured and informal. A test of difference in the means confirms the above finding and shows that there is only one significant difference, which relates to the local private sector and the foreign private sector. Given that formal and structured strategic planning procedures are more likely to result in written and longer strategic plans, the above results support the previous findings that the number of foreign private organizations which do not have written strategic plans is significantly less than that of local private organizations.

The last two statements in Table 3 examine the political behaviour of strategy-makers. There is partial agreement that a strategy is a compromise which accommodates the conflicting interests of powerful groups and individuals. With only one exception, the manufacturing sector, the means for the whole sample and sub-samples are slightly above the mid-point (means range between 3.07 and 3.34). There is little difference between sectors. A test of difference in means supports this and reveals that there is no significant difference relating to the above statement. Inconsistent with the above, there is broad disagreement that strategy is personal and goals-oriented (means range between 2.13 and 2.49). There is little difference between the sub-samples and no significant difference was found. In order to solve this dilemma, the means of both statements were calculated and it was found that this is less than the midpoint of 3 for the whole sample and sub-samples (means range between 2.65 and 2.85), indicating that the strategy adopted may not be the result of political activity.

### **Individuals participating in strategic planning process**

Individuals and teams participating in the strategic planning process are shown in **Table 4**. There is a high degree of agreement in the findings shown in Table 4 for the whole sample and sub-samples. One of the very few disagreements in Table 4 is that, although the board of directors participates strongly in the strategic planning process in both large organizations (mean equals 4.24) and small organizations (mean equals 3.67), this participation was significantly stronger in large organizations than in small organizations. It is worth noting that out of 18 tests of difference in means between the sub-samples, this was the only significant difference.

For the sample as a whole and the sub-samples, it appears that CEOs/managing directors have the greatest level of participation in the strategic planning process, while the board of directors, planning committees and

**Table 4.** Individuals participating in strategic planning process

	All organizations <sup>4</sup> (N = 120)	Ownership		Type of activity		Number of employees	
		Local private (N = 41)	Foreign private (N = 46)	Manufacturing (N = 45)	Services (N = 64)	Small (N = 55)	Large (N = 51)
CEO/managing director	4.09	4.20	4.17	4.16	4.17	4.00	4.37
Board of directors	3.86	4.02	3.80	3.71	4.08	3.67	4.24
Planning committee	3.58	3.56	3.72	3.49	3.67	3.40	3.78
Groups of senior managers	3.29	3.27	3.41	3.22	3.30	3.13	3.39
Groups of middle/lower managers	2.53	2.49	2.39	2.42	2.53	2.45	2.47
Outsiders (e.g., external consultants)	2.23	2.20	2.17	2.29	2.14	2.05	2.29

<sup>4</sup>The mean is an average on a scale of 1 = strongly disagree to 5 = strongly agree.

groups of senior managers come in second, third and fourth, respectively. All the previous individuals are appreciably above the median, indicating a high level of participation in the strategic planning process. Table 4 also shows that only two parties, groups of middle/lower managers and outsiders, are considerably below the median, indicating that they do not actively participate in the strategic planning process. The above findings show a positive relationship between the managerial level and the degree of participation in the strategic planning process.

Some 74% of respondents show that CEOs or managing directors to a great extent — or to a very great extent — participate in the strategic planning process. Similarly, 57% and 65% of respondents think that the board of directors and planning committees, respectively participate to a great extent or to a very great extent in the strategic planning process. Some 44% of respondents reveal that senior managers participate to a great extent or to a very great extent in the strategic planning process. Conversely, only 15% think that middle/lower managers participate to a great extent or to a very great extent in this process. These findings support the previous argument that there is a positive link between the managerial level and the degree of participation in the strategic planning process and demon-

strate that the higher the seniority, the greater the participation in the strategic planning process.

The most striking feature of the results in Table 4 relates to how few organizations make use of outsiders, such as external management consultants. Only 18% of respondents see that outsiders participate to a great extent or to a very great extent in the strategic planning process; while 58% of respondents think that outsiders participate to a small extent or to a very small extent in the strategic planning process.

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*Few organizations make  
use of external  
management consultants*

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#### Views on strategic planning outcomes

**Table 5** demonstrates respondents' views on a number of statements concerning the strategic planning outcomes. The six highest ranked statements show very positive attitudes towards strategic planning, with the first ranked being that 'strategic planning has assisted our managers to consider the future implications of current decisions'. There is



**Table 5.** Views on strategic planning outcomes

	All organizations <sup>5</sup> (rank) (N = 120)	Ownership		Type of activity		Number of employees	
		Local private (rank) (N = 41)	Foreign private (rank) (N = 46)	Manufacturing (rank) (N = 45)	Services (rank) (N = 64)	Small (rank) (N = 55)	Large (rank) (N = 51)
Strategic planning has assisted our managers to consider the future implications of the current decisions	4.04 (1)	3.88 (1)	4.02 (1 =)	4.00 (1)	4.08 (1)	3.98 (1)	4.08 (1)
Strategic planning has led to the development of a sustainable competitive position	3.91 (2)	3.83 (2)	3.98 (4)	3.93 (2)	3.92 (3)	3.85 (3)	3.98 (2)
Strategic planning has led to building commitment to action among line managers	3.87 (3)	3.66 (4)	4.02 (1 =)	3.91 (3 =)	3.81 (6)	3.82 (4)	3.84 (4)
Strategic planning has led to the development of a shared vision for the organization and unity of purpose among the management team	3.85 (4)	3.73 (3)	3.87 (5)	3.67 (5)	3.95 (2)	3.89 (2)	3.78 (5)
Strategic planning increased effectiveness in achieving our organization's objectives over the past 5 years	3.83 (5)	3.59 (6)	4.00 (3)	3.91 (3 =)	3.83 (5)	3.78 (5 =)	3.96 (3)
Strategic planning has led to the achievement of a good fit between the external environment and the internal capabilities of our organization	3.77 (6)	3.61 (5)	3.76 (6)	3.62 (6)	3.86 (4)	3.78 (5 =)	3.73 (6)
Strategic planning encourages excessive bureaucracy	2.58 (7)	2.68 (7)	2.52 (7)	2.60 (7)	2.55 (7)	2.60 (7)	2.45 (7)
Strategic planning discourages initiative	2.25 (8)	2.39 (8)	2.15 (8)	2.29 (8)	2.28 (8)	2.40 (8)	2.12 (8)

<sup>5</sup> The mean is an average on a scale of 1 = strongly disagree to 5 = strongly agree.

also broad agreement that strategic planning has led to the development of a sustainable competitive position and a shared vision for the organization and the building of a commitment to action among line managers. Respondents also agree that strategic planning increased effectiveness in achieving their organizations' objectives over the past 5 years and that it has led to the achievement of a good fit between the external environment and the internal capabilities of their organizations. Consistent with this, the negative statements regarding strategic planning outcomes take the lowest ranking positions. Respondents disagree that 'strategic planning encourages excessive bureaucracy' and that 'strategic planning discourages initiative'.

Table 5 also shows that there is relatively little difference in rank order of the positive statements between the sub-samples in each sector, i.e., local private organizations versus foreign private organizations, manufacturing organizations versus service organizations and small organizations versus large organizations. Moreover, there is no variation in rank order of the two negative statements between the whole sample and the six sub-samples. A test of difference in means lends support to this finding. Out of 24 tests of difference in means between the sub-samples of the three sectors, there is only one significant difference, that regarding 'strategic planning increased effectiveness'. Although respondents in both local and foreign organizations agree that strategic planning increased effectiveness in achieving the organization's objectives over the past 5 years, the level of agreement was significantly higher in foreign organizations than in local organizations. In conclusion, the above results demonstrate that the respondents have positive attitudes towards strategic planning.

### Use of tools of strategic planning

Moving on to the tools of strategic planning, respondents were asked to indicate to what extent their organizations use the various tools of strategic planning, on the basis of a scoring system of 1 = not at all, to 5 = to a very great

extent. **Table 6** shows the means and ranks of the whole sample and the six sub-samples for each of the tools given. It also indicates the numbers and percentages of respondents who are not familiar with each tool.

Dealing first with the whole sample, the first nine tools clearly exceed the median measure, i.e., pro forma financial statements, cost-benefit analysis, SWOT analysis, competitor analysis, portfolio analysis, benchmarking, analysis of critical success factors, gap analysis and product lifecycle analysis. One of the reasons for this finding may be associated with the ease with which these nine tools can be prepared and used. Little use is made of spreadsheet 'what if' analysis, economic forecasting models and strategic planning software. This may be due to the more demanding skills required to use these tools effectively. In this regard it is the ease of application that is determining the type of tool used in strategic planning.

The high ranking of tools which focus on analysing both internal and external factors (i.e., SWOT analysis, competitor analysis, portfolio analysis, benchmarking, analysis of critical success factors and product lifecycle analysis) may be contrasted with the lower ranking of experience curve analysis, value chain analysis, the Boston consulting group matrix, Porter's 5-forces analysis and PEST analysis. This may be due to the fact that organizations simply do not value the latter group.

Both balanced scorecard and cognitive mapping are little used. This is not surprising as they are relatively new tools compared with many of the others listed, and it is likely that among the sample awareness of these tools is limited. Consistent with Glaister and Falshaw's (1999) results for UK organizations, little use is made of stakeholder analysis, scenario construction, PIMS analysis and the Delphi technique.

Table 6 also shows that the percentages of respondents who are not familiar with the identified tools of analysis range between 13% and 63%. Less than 30% of the sample is not familiar with the first nine tools, clearly exceeding the median measure, while with

four exceptions (i.e., economic forecasting models, outsourcing analysis, strategic planning software and stakeholder analysis), 30% or more of the sample is not familiar with all the tools which go below the median measure. From these findings, it can be concluded that there is a need for a wider understanding of the strategic planning tools available and their application in providing a better understanding of strategy development.

As shown in Table 6, the first five tools of strategic planning have the same rank order in both the local and foreign private sectors, while for the rest of the tools there are a number of variations in rank order between the two groups. Moreover, a test of difference in means between the two groups of organizations indicates seven significant differences out of 24 differences, those regarding SWOT, competitor, portfolio, benchmarking, critical success factor analyses, economic forecasting models and scenario construction.

It was expected that the means of the current use of strategic planning tools, with only three exceptions (spreadsheet analysis, cognitive mapping and the Delphi technique), in the foreign private sector are bigger than those in the local private sector. Consistent with this, the seven significant differences mentioned above have higher use in foreign private organizations than in local private firms, while there is no significant difference between the foreign private sector and the local private sector regarding the three tools. The relatively higher use of strategic planning tools in the foreign private sector may be due to the fact that they are supported from headquarters by staff who are aware of the tools of strategic planning, or such organizations may be requested by their headquarters to use such tools.

In agreement with Glaister and Falshaw (1999), Table 6 indicates that there is little variation in rank order and means of the tools of strategic planning between manufacturing and service firms. A test of difference in means between the two groups of organizations shows only two significant differences, those regarding balanced scorecard (higher use in

the service sector) and cognitive mapping (higher use in the manufacturing sector). However, with only three exceptions (stakeholder, PEST and PIMS analyses), the percentages of respondents in the manufacturing sector who are not familiar with the listed tools are lower than those of the respondents in the service sector. This is not a surprising result, given that manufacturing organizations are pioneers in developing and using strategic planning tools.

Considering that the use of strategic planning tools is expensive because of the need to undertake many activities and use specialized staff, any organization which uses them should be large enough to afford the cost of doing so (Fredrickson and Iaquinto, 1989; Snyman and Drew, 2003). The results presented here lend some support to this argument. Although Table 6 shows slight differences in rank order between small organizations and large ones, the means of the current use of strategic planning tools, with only two exceptions (the Boston consulting group matrix and the Delphi technique), in large organizations are greater than those in small organizations. A test of difference in means between large and small indicates 10 significant differences, these being pro forma financial statements, benchmarking, gap, spreadsheet, PEST, outsourcing, balanced scorecard, stakeholder, scenario construction and PIMS analyses. These have a significantly higher use in large organizations than in small ones. Moreover, there is no real difference between large and small organizations regarding the Boston consulting group matrix and the Delphi technique, which have a higher use in small firms. These findings highlight the importance of organization size in using the tools of strategic planning.

## **Discussion and conclusions**

This paper has reported on the nature and practice of strategic planning in organizations working in Egypt. A number of findings can be derived which could be beneficial for both executives and academics. Unlike other

Table 6. Use of tools of strategic planning

	All organizations (N = 120)		Ownership				Type of activity				Number of employees			
	Mean (rank)	Not familiar	Local private (N = 41)		Foreign private (N = 46)		Manufacturing (N = 45)		Services (N = 64)		Small (N = 55)		Large (N = 51)	
			Mean (rank)	Not familiar	Mean (rank)	Not familiar	Mean (rank)	Not familiar	Mean (rank)	Not familiar	Mean (rank)	Not familiar	Mean (rank)	Not familiar
Pro forma financial statements (e.g., cash flow, income statement and budget)	4.04 (1)	23 (19%)	3.82 (1)	7 (17%)	4.28 (1)	6 (13%)	4.05 (1)	4 (9%)	3.96 (1)	16 (25%)	3.63 (1 =)	12 (22%)	4.40 (1)	9 (18%)
Cost-benefit analysis	3.86 (2)	17 (14%)	3.77 (2)	6 (15%)	4.19 (2)	4 (9%)	4.02 (2)	2 (4%)	3.69 (3)	12 (19%)	3.63 (1 =)	12 (22%)	3.96 (3)	3 (6%)
SWOT analysis <sup>6</sup>	3.81 (3)	19 (16%)	3.49 (3)	4 (10%)	4.15 (3)	6 (13%)	3.77 (4)	3 (7%)	3.74 (2)	14 (22%)	3.51 (3)	6 (11%)	3.98 (2)	9 (18%)
Competitor analysis/competitive intelligence	3.66 (4)	15 (13%)	3.31 (4)	6 (15%)	4.02 (4)	2 (4%)	3.82 (3)	2 (4%)	3.55 (4)	11 (17%)	3.49 (4)	8 (15%)	3.72 (5)	4 (8%)
Portfolio analysis	3.32 (5)	29 (24%)	3.12 (5)	8 (20%)	3.72 (5)	10 (22%)	3.20 (7)	5 (11%)	3.45 (5)	20 (31%)	3.05 (5)	12 (22%)	3.56 (7)	15 (29%)
Benchmarking	3.32 (6)	28 (23%)	2.71 (11)	7 (17%)	3.67 (6)	10 (22%)	3.24 (6)	4 (9%)	3.41 (6)	18 (28%)	2.82 (8)	11 (20%)	3.76 (4)	10 (20%)
Analysis of critical success factors	3.19 (7)	32 (27%)	2.83 (9)	12 (29%)	3.54 (7)	7 (15%)	3.13 (8)	6 (13%)	3.30 (7)	21 (33%)	3.00 (6)	15 (27%)	3.33 (8)	12 (24%)
Gap analysis	3.14 (8)	33 (28%)	2.97 (6)	6 (15%)	3.42 (8)	13 (28%)	2.77 (10)	10 (22%)	3.28 (8)	18 (28%)	2.49 (10 =)	12 (22%)	3.63 (6)	16 (31%)
Product lifecycle analysis	3.10 (9)	16 (13%)	2.95 (7)	3 (7%)	3.30 (10)	6 (13%)	3.33 (5)	2 (4%)	2.91 (11)	11 (17%)	2.85 (7)	8 (15%)	3.13 (11 =)	6 (12%)
Spreadsheet 'what if' analysis	2.82 (10)	42 (35%)	2.87 (8)	10 (24%)	2.72 (17)	19 (41%)	2.49 (15)	10 (22%)	3.11 (9)	27 (42%)	2.49 (10 =)	16 (29%)	3.16 (10)	20 (39%)
Economic forecasting models	2.75 (11)	25 (21%)	2.26 (20)	6 (15%)	3.37 (9)	8 (17%)	2.70 (12)	8 (18%)	2.69 (15)	15 (23%)	2.51 (9)	10 (18%)	2.95 (16)	13 (25%)

PEST analysis <sup>7</sup>	2.75 (12)	57 (48%)	2.52 (15)	20 (49%)	3.19 (11)	20 (43%)	2.42 (18)	21 (47%)	2.83 (12)	29 (45%)	2.11 (21)	28 (51%)	3.13 (11 =)	21 (41%)
Outsourcing analysis	2.73 (13)	31 (26%)	2.66 (12)	9 (22%)	2.76 (16)	9 (20%)	2.73 (11)	8 (18%)	2.67 (16)	16 (25%)	2.33 (12)	15 (27%)	3.00 (14 =)	10 (20%)
Balanced scorecard	2.70 (14)	38 (32%)	2.55 (14)	8 (20%)	2.91 (14)	13 (28%)	2.26 (21)	11 (24%)	2.95 (10)	20 (31%)	2.13 (20)	16 (29%)	3.28 (9)	15 (29%)
Stakeholder analysis	2.66 (15)	35 (29%)	2.44 (16)	7 (17%)	3.00 (13)	16 (35%)	2.53 (14)	13 (29%)	2.72 (14)	17 (27%)	2.26 (14)	17 (31%)	3.03 (13)	14 (27%)
Scenario	2.56 (16)	54 (45%)	2.09 (22)	18 (44%)	3.07 (12)	19 (41%)	2.19 (22)	18 (40%)	2.80 (13)	29 (45%)	2.15 (17 =)	21 (38%)	2.88 (17)	26 (51%)
construction/analysis	2.56 (17)	75 (63%)	2.82 (10)	24 (59%)	2.69 (18 =)	30 (65%)	3.05 (9)	26 (58%)	2.09 (22)	42 (66%)	2.09 (22)	33 (60%)	3.00 (14 =)	35 (69%)
Cognitive mapping	2.50 (18)	32 (27%)	2.31 (17)	9 (22%)	2.85 (15)	12 (26%)	2.46 (16)	10 (22%)	2.41 (18 =)	20 (31%)	2.14 (19)	12 (22%)	2.74 (18)	17 (33%)
Strategic planning	2.48 (19)	58 (48%)	2.57 (13)	18 (44%)	2.69 (18 =)	20 (43%)	2.40 (19)	20 (44%)	2.50 (17)	30 (47%)	2.21 (16)	27 (49%)	2.65 (20)	25 (49%)
Experience curve	2.45 (20)	36 (30%)	2.28 (19)	9 (22%)	2.61 (21)	15 (33%)	2.55 (13)	7 (16%)	2.41 (18 =)	25 (39%)	2.15 (17 =)	16 (29%)	2.69 (19)	16 (31%)
Value chain analysis	2.40 (21)	55 (46%)	2.22 (21)	18 (44%)	2.68 (20)	21 (46%)	2.43 (17)	17 (38%)	2.36 (20)	31 (48%)	2.27 (13)	22 (40%)	2.50 (21)	25 (49%)
Porter's 5-forces	2.27 (22)	56 (47%)	2.30 (18)	14 (34%)	2.50 (22)	22 (48%)	2.37 (20)	15 (33%)	2.24 (21)	35 (55%)	2.22 (15)	19 (35%)	2.18 (23)	29 (57%)
Boston consulting														
group matrix or														
General Electric														
matrix														
PIMS analysis <sup>8</sup>	2.10 (23)	70 (58%)	2.00 (23)	23 (56%)	2.35 (23)	26 (57%)	1.89 (23)	26 (58%)	2.04 (23)	37 (58%)	1.50 (24)	33 (60%)	2.48 (22)	28 (55%)
Delphi technique	1.89 (24)	67 (56%)	1.85 (24)	21 (51%)	1.76 (24)	25 (54%)	1.61 (24)	22 (49%)	1.92 (24)	39 (61%)	1.83 (23)	26 (47%)	1.56 (24)	23 (45%)

<sup>6</sup>SWOT is an acronym that stands for Strengths, Weaknesses, Opportunities, and Threats.

<sup>7</sup>PEST is an acronym that stands for Political, Economic, Social and Technological factors.

<sup>8</sup>PIMS is an acronym that stands for Profit Impact of Market Strategy.



studies in developed countries, 35.8% of organizations in this research do not have written strategic plans. This may indicate that organizations working in Egypt practice strategic planning less than their counterparts in developed countries. However, this in itself demonstrates that 64.2% of organizations in the sample have moved beyond short-term management and are actively planning for the future.

It is worth noting that the resources required for adopting a strategic planning approach may not be a significant obstacle in the Egyptian setting, whereas environmental uncertainty certainly could be. Although the results indicate that the strategy adopted may not be a result of any political activity, managers should be aware of the long-lasting and potentially detrimental effects of this activity. Consistent with previous research, the evidence is that managers engaging in internal politics make less effective strategies than those who do not (e.g., Dean and Sharfman, 1996; Eisenhardt *et al.*, 1997a; Elbanna and Child, 2007b; Janis, 1989; Nutt, 1993). Hence, strategy-makers need to defuse political tactics (Eisenhardt *et al.*, 1997b) in order to achieve and implement successful strategies and consequently improve organizational performance.

In line with the findings of previous research on Egyptian managers' respect for leadership and hierarchical distance (Elbanna and Child, 2007a), more than two-fifths of respondents see a senior executive's mission or vision as their strategy. Also, there is a positive relationship between the managerial level and the degree of participation in the strategic planning process. Consistent with this, comparative cross-cultural investigations by Hofstede (1991) and Trompenaars (1973) suggest that Egyptian managers are likely to keep a long hierarchical distance and be relatively respectful towards leadership. From their review of relevant studies, Hickson and Pugh (2001) characterize Egyptian managers as sensitive to personal relationships with superiors. Egyptian commentators tend to confirm this picture (Leila *et al.*, 1985;

Youssef, 1994). It is clear then that one of the clearest Egyptian characteristics in leadership style is the strong emphasis on individualism.

Although few organizations make use of external management consultants in the strategic planning process, respondents appear satisfied with the results of strategic planning. This should not be interpreted as that managers working in Egypt should not ask for advice and help from external consultants when preparing their strategic plans. The nature of the respondents (namely, MBA students) in this study has to be considered when interpreting the results. In a country such as Egypt, MBA students and graduates are most likely to work in multinational organizations or high-performing Egyptian firms. The descriptive analysis of the sample mentioned earlier confirms this conclusion. Lack of external consultants in the application of strategic analytical tools in such organizations could be seen as a major weakness undermining the effectiveness of strategic planning. As such, the results of this study on the use of external consultants should be interpreted with caution.

There is significant evidence to suggest that the respondents have positive attitudes towards strategic planning as an effective management tool. Indeed, the respondents in all sectors strongly agree that strategic planning is important. There is also broad agreement among the sampled firms that strategic planning has assisted them in considering the future implications of the current decisions, and has led to the development of a sustainable competitive advantage and a shared vision for the organization. There is also broad agreement that strategic planning has led to the building of a commitment to action among line managers, and increasing the effectiveness of achieving business objectives. It is worth noting that the results presented here are consistent with those of Glaister and Falshaw's study on the nature and practice of strategic planning in UK companies. In both studies, the highest ranked statements show positive attitudes towards strategic planning.

It has been found that a large set of strategic tools are used to an insignificant extent by

the sampled organizations. This may be due to the lack of awareness of these tools and their application to strategy development. For example, although the balanced scorecard was first introduced about 15 years ago (Kaplan and Norton, 1992) and has been widely used (Braam and Nijssen, 2004; Kaplan and Norton, 2001), 38% of respondents were not aware of this tool.

The use of the tools of strategic planning in the foreign private sector is generally greater than in the local private sector, while there are relatively few significant differences between manufacturing and service organizations. Moreover, this study stresses the importance of organization size in strategic tools and suggests that small organizations do not necessarily undertake strategic planning to the same depth or procedure as large ones.

One of the most striking results of this study relates to the very little use of what, to many, are regarded as the traditional tools of strategic management. Tools such as experience curve analysis, value chain analysis, Porter's 5-forces analysis, the Boston consulting group matrix, General Electric matrix and the Delphi technique are used only to a small extent. This is noticeable in both the whole sample and the sub-samples.

It is worth noting that organizations in the sample do not necessarily use the listed tools of strategic planning in the same way. For example, the term 'cost-benefit analysis' is used frequently in business planning. However, the term itself has no precise definition beyond weighing the total expected costs versus the total expected benefits of one or more actions in order to choose the best or most profitable option. The term also covers several varieties of approach, which attempt to predict the financial impacts and other business consequences of an action. In cost-benefit analysis, monetary values may also be assigned to less tangible effects, such as risk, loss of reputation, market penetration and long-term strategy alignment. This is especially relevant to government and not-for-profit organizations using the technique, for instance, to decide whether to introduce a

business regulation or build a new road. Organizations in the sample may conduct very different types of cost-benefit analysis and other tools of strategic planning, using different approaches or methodologies.

The unexpected result of this study — that a high percentage of respondents are not familiar with some of what are regarded as the traditional tools of strategic management — shows that there is clearly a need for wider understanding of planning tools and their role in improving the process of strategy development. Considering that the sample consists of MBA students, who are supposed to be aware of such tools, this result has some implications for both organizations and providers of MBA programmes.

A central theme of high importance in the strategic management field is the way in which organizations adapt to changing environments (Robbins, 2001; Sharfman and Dean, 1997). Accordingly, the adoption of a strategic approach and the use of relevant tools would appear to offer real benefits to the firm (Koufopoulos and Chryssochoidis, 2000). However, it must be remembered that strategic planning tools neither make strategy nor implement it, but they can be used in gaining new insights, understanding and making sense of complex issues (Hussey, 1997).

Although this study provides many important insights, the results raise additional research questions which merit further study. For example, what is the relationship between the level of strategic planning practice and organizational success? In other words, is the performance of organizations categorized as strategic planners better or worse than that of non-strategic planners? This study does not tell us either about the different approaches or methodologies which organizations use to conduct each strategic planning tool or the quality of use which the sampled organizations give to the tools of strategic planning. This could be another promising avenue for further research.

Moreover, in the strategic management field, replication and extension research is much needed (Hubbard *et al.*, 1998). Therefore,

further research is needed to test the generalizability of the results of this work. In conclusion, it is hoped that this study will persuade others to engage in similar research on strategic planning and its role in enhancing the competitive advantage of organizations working in Egypt and the Middle East.

### Biographical note

*Said Elbanna* is an Assistant Professor in Strategic Management at UAE University. He received his MSc degree from Cairo University and his PhD degree from the University of Birmingham. His main research interests are in strategic decision-making, strategic planning and the balanced scorecard. His work has appeared in the *Strategic Management Journal*, the *Journal of Management Studies* and the *International Journal of Management Reviews*.

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